

**BOTTOM LINE**  
(209) 984-1040  
2023 Tax Information

The following questions help me understand your tax situation. If you are filing jointly, each question also applies to your spouse. Please answer each question with a yes (Y) or no (N). If a question does not pertain to you, please answer it with a no. If you are a new client, please fill out the “New Client Information” sheet and provide a copy of your tax return from last year.

- 1) \_\_\_ Do you have an e-mail address? If yes, please provide \_\_\_\_\_
- 2) \_\_\_ Did you and your dependents have health care coverage for the full year? Please initial the appropriate line.  
    \_\_\_ All household members covered under private/employer plan, Medical or Medicare.  
    \_\_\_ All household members covered through the Insurance Marketplace (Covered California) **Please include form 1095-A** and income amounts from all dependents.
- 3) \_\_\_ If you are getting a refund would you like it directly deposited? If "yes" please initial your choice.  
    \_\_\_ Use same account as last year.  
    \_\_\_ You will provide bank information (cancelled check).
- 4) \_\_\_ Has there been a change in your address, phone number, marital status, people living with you or people that you support?
- 5) \_\_\_ Did any of your dependents under age 19 (24 if a college student) have unearned income (e.g., interest or dividends) of over \$2,500?
- 6) \_\_\_ At any time during 2023, did you receive, sell, exchange or otherwise dispose of any interest in any virtual currency (e.g., Bitcoin)?
- 7) \_\_\_ Did you incur child care or dependent care expenses in order to go to work or school? Include name, address, phone number, amount paid and EIN/SSN of the provider.
- 8) \_\_\_ Did you pay education expenses for yourself or any dependents for post-secondary education? Please bring the 1098-T (required) from the school and provide the amount of tuition, books and supplies on the “Due Diligence” worksheet.
- 9) \_\_\_ Did you sell or trade any assets (e.g., stocks)?
- 10) \_\_\_ Are you reporting any gambling winnings for 2023?  
    If yes, amount of gambling losses in 2023 \$\_\_\_\_\_.
- 11) \_\_\_ Did you make any large purchases (especially a motor vehicle or boat)? If you itemize, the sales tax paid on these items may be a better option.
- 12) \_\_\_ Did you contribute to or roll over/convert funds to a traditional or Roth IRA?
- 13) \_\_\_ Did you receive or pay any alimony? Date of original divorce or separation agreement \_\_\_\_\_.
- 14) \_\_\_ Did you have any moving expenses?
- 15) \_\_\_ Did you contribute to or receive a distribution from a Health Savings Account? Please include form 1099SA. This shows any distributions you took from the account.
- 16) \_\_\_ Do the loan(s) on your current home(s) include any amounts that were not used to buy or improve your property? If yes, please have the details as we may have to allocate your deductible mortgage interest. 17) \_\_\_ Did you have purchasing, selling, refinancing, financing or foreclosing transactions on your personal residence or any other real estate? If yes, provide the settlement document (HUD-1), Form 1099-S, Form 1099C, Form 1099-A or other related documentation.
- 18) \_\_\_ Did you have any debt that was cancelled in 2023? (i.e., debt that you owed to a creditor that you are no longer required to pay) If yes, provide Form 1099-C, Form 1099-A or other documentation.

- 19) \_\_\_ Did you make any gifts directly or through a trust which exceeded \$17,000 per person?
- 20) \_\_\_ Did you pay more than \$2,600 in 2023 to any one household employee? If yes, federal employment taxes due can be reported and paid on your tax return.
- 21) \_\_\_ Did you have any interest in, signature or other authority over a bank, securities, or other financial account in a foreign country? Do you own any assets with a fair market value of over \$50,000 in a foreign country? Did you receive a foreign inheritance of \$100,000 or more?
- 22) \_\_\_ Last year, did the IRS or Franchise Tax Board make you aware or are you aware of any changes to your income, deductions and credits reported on any prior year's tax return?
- 23) \_\_\_ Have you purchased anything on-line or in another state and not paid your resident state sales tax? Any amount due can be paid with your California return.
- 24) \_\_\_ Have you received any bartering (trading your services for someone else's services or something of value) income in 2023? Any bartering income is required to be included on your return.
- 25) \_\_\_ If you are self-employed, did you pay any health or long-term care insurance premiums?  
 \_\_\_ If yes, were either you or your spouse eligible to participate in an employer-sponsored health or long-term care insurance plan?
- 26) \_\_\_ Would you like to authorize me to discuss your return with the IRS?
- 27) \_\_\_ Did you make any energy efficient improvements to your home (e.g. new windows, insulation or solar) or buy a new or used electric car?
- 28) \_\_\_ Did you pay rent in California for at least half the year in 2023?

**In 2023, what was your physical address and county?**

Address: \_\_\_\_\_ County: \_\_\_\_\_

**Please provide your driver's license information (not required):**

State: \_\_\_\_\_ License # \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp. Date \_\_\_\_\_

Spouse (if applicable) driver's license information.

State: \_\_\_\_\_ License # \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp. Date \_\_\_\_\_

**I/We have answered the above questions accurately and truthfully.**

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
Signature and Date

Best phone number to reach you: \_\_\_\_\_

**PRIVACY STATEMENT**

We do not disclose any non-public personal information about our customers or former customers to anyone, except as instructed to do so by such customers or as required by law. We restrict access to non-public personal information to those professionals necessary to prepare your tax return and we maintain physical, electronic and procedural safeguards to guard your non-public personal information.